

# Financial Services Company or Professional third party authority form

Macquarie Bank Limited ABN 46 008 583 542 AFSL 237502. Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281.  
Macquarie Equities Limited ABN 41 002 574 923 AFSL 237504.

Use this form to authorise a Financial Services Company or Professional to operate or view your Macquarie Cash Hub Account, Macquarie Wrap Account, Macquarie Vision Account and/or Macquarie Term Deposit Account on your behalf and specify the level of authority you wish to give them.

Please consider carefully who you appoint as a third party authority on your accounts as we may follow their instructions as if they were yours. They will have access to your account details (BSB, account number and account name), account balance and transaction history, which includes your personal information. It's important that you understand this risk and carefully consider what level of authority you give to them.

Refer to the relevant 'Wrap Change of Account Details' form to replace your primary Financial Services Professional for Wrap Cash Accounts and/or Vision Cash Accounts.


Third parties appointed on a Wrap Cash Account and/or Vision Cash Account will also have access to account details and reporting of other accounts within the same group.

To understand the requirements for adding or removing a third party authority on your account, visit '**Guide to completing CMA Third Party Authority forms**' in our Personal Help Centre.

For more information, visit '**Set up a third party authority for your accounts**' in our Personal Help Centre.

The account holder(s) are required to complete the following:

- ▶ **To appoint a financial services company or professional as a third party authority, complete sections 1, 2 and 4**
- ▶ **To add a new financial service professional and remove existing financial service professional, complete sections 1, 2 and 4**
- ▶ **To remove an existing third party authority on your account, complete sections 1, 3 and 4**

 **It's important you understand what level of access you are granting a third party. You can revoke these authorities at any time by contacting us.**

To see a summary of the different levels of authority you can appoint to certain third parties and what that Authorised User can do, please refer to our **Terms and Conditions**.

## 1. Your Macquarie account details

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Account number:

Account name:

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## 2. Appoint a Financial Services Company or Professional

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Appoint a financial services professional (for example a financial adviser or accountant) to have view authority to your account. Where your account is opened by a financial services professional, accelerator account transfer authority will automatically be applied to their financial services company.

Add a new financial service professional with View authority<sup>1</sup>

Add a new financial service professional and remove existing financial service professional

Full name:

Adviser Code (if known):

Appoint a company or other third party firm (e.g. a financial advisory firm, stockbroking firm, accounting firm or administrator) to have access and/or withdrawal authority to your account.

*If your Financial Services Professional does not have a Macquarie ID, they will need to complete the Macquarie Registration - Representative form.*

Company:

Dealer Code / Bulk Transacting Code (if known):

### Select all that apply:

View Authority<sup>1</sup>

Accelerator Account Transfer Authority

Term Deposit Authority<sup>2</sup>

Tax/Government Payment Authority<sup>2,3</sup>

Financial Services Debt Authority<sup>2,3</sup>

General Withdrawal Authority<sup>2,3,4</sup>  
(not required for AIP)

1. View Authority appointed on a Macquarie Cash Management Account or Vision Cash Account will automatically be replicated on the linked Macquarie Cash Management Accelerator Account or Vision Savings Account.
2. This authority type is not available on Macquarie Cash Management Accelerator Accounts or Vision Savings Accounts.
3. Requires Bulk Transacting Access.
4. General Withdrawal Authority is only available to select firms that meet specific eligibility criteria. Tax Payment Authority and Financial Services Debit Authority will be automatically applied where General Withdrawal Authority is requested and eligibility criteria is not met.

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## 3. Remove a Financial Services Company or Professional

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Remove view authority, and accelerator account transfer authority where applicable, for a financial services professional (for example, a financial adviser or accountant) to your account.

- Unless otherwise agreed with us, removing a Financial Services Company will also remove all associated Financial Service Professional access, as well as their ability to set up and operate Direct Debits arrangements, scheduled payments, and edit mailing addresses.
- If you have also appointed the third party as a 'nominated representative' to share Consumer Data Right (CDR) data from your selected account(s), you will need to separately revoke them as a nominated representative (for information on how to revoke a nominated representative or for information on CDR generally, visit [macquarie.com.au/help](https://macquarie.com.au/help) and search for 'Open Banking and the Consumer Data Right').

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## 4. Declaration and signature of account holders

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Your request must be signed in accordance with your account signing instructions. Please note that the directors/secretary who sign must be existing account signatories. I/we:

- accept and agree to be bound by the terms and conditions in the applicable Account Terms and Conditions
- authorise the person or entity whose name appears in section 2, which includes the individual signatories appointed by the company/dealer group, to view/operate my/our account, and
- acknowledge and agree that any person appointed in section 2, will automatically be granted View authority on any Accelerator/Vision Savings Account that is linked to my/our Macquarie CMA/Vision Cash Account, and
- where you are an attorney for an account holder, you declare that the appointment of any person as set out in section 2 does not constitute an appointment as a substitute, delegate or sub-attorney.

**Signature 1:**

**Signature 2:**

Name:

Name:

Date (DDMMYYYY):

Date (DDMMYYYY):

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### Sign

☒ **Wet signature**, please provide a copy of your Driver's Licence or passport. **OR**

☒ **Electronic signature** - please provide a copy of the Certificate of Completion.  
Visit Personal Help Centre and search 'Electronic Signature' to view our approved list of electronic signature providers.

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### Need Help?

For more information, please visit **Personal Help Centre**.

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### Submit



**Financial Services Company or Professional:**

Log in to **Adviser Online**, navigate to **Request Centre**, and upload completed form.

**Others:** Email to **transact@macquarie.com**